CONTRACT GUIDANCE TO ENGAGEMENT MANAGER OR SERVICES EXECUTIVE

This SOW is for reference should your engagement ***not use*** the Global Delivery factory model for migration. The purpose of this document is provide an example Migration Jumpstart which could be leveraged by delivery resources. For leveraging the Unit Price Model for Application Migration, please work with your GD SSSP noted in the Engagement Manger and Architect Guide to generate the appropriate SOW.

The following information is intended to help you draft a well-written and thorough description of services in a Work Order (WO) or Statement of Work (SOW). The information that is provided here reflects the basis for a standard implementation of this Offering; it is given in the form of building blocks that can be used during the development of the specific WO or SOW.However, the specific customer requirements and terms that are negotiated for a given implementation of this Offering might require the addition, deletion, or adjustment of content to define properly the services that are offered, set the appropriate customer expectations, and define Microsoft obligations.

Please follow the regular quality assurance process for Complex Deals’ structuring, validation, and approval that is facilitated by the Services Business Desk (SBD) as per the [Enterprise Services Authorization P](https://spsites.microsoft.com/sites/esaponline/esaponline/Pages/Home.aspx)olicy, as this might apply to your specific engagement.The content that this document provides does not cover all the areas of a complete SOW. Please help make sure that Governance Approach, Project Organization, Timeline, Service Deliverables Acceptance Process, and other standard chapters are included, when applicable.

The English version SOW template into which you can insert your Offering can be found at [www.k360.ms](http://www.k360.ms).

To obtain a localized version of these templates, please visit [www.k360.ms](http://www.k360.ms) or contact your local SBD Contract and Negotiation Executive.

**Text Color Guide**

Instructional Text:

Pink text 🡪 Used by the Offering Lead to provide customized instruction to the engagement manager or services executive regarding the specific Offering. All pink text should be deleted prior to submission to the customer.

Blue text 🡪 Used by the Offering Lead to provide examples of content for the engagement manager or services executive. This text is meant to be customized and, depending on the engagement, kept and turned to black text or deleted. Remaining blue text should be deleted prior to submission to the customer.

Contract Text:

Black text 🡪 Used to identify standard boilerplate text in the final customer contract.

Enterprise Modernization



Migration Jumpstart

Statement of Work

Prepared for

April 3, 2015

Version 1.0

Prepared by

**<Author>**

Contributors

Table of Contents

[1 Project Objectives and Scope 1](#_Toc415820950)

[1.1 Objectives 1](#_Toc415820951)

[1.2 Areas Within Scope 1](#_Toc415820952)

[1.2.1 Software Products/Technologies 3](#_Toc415820953)

[1.2.2 Environments 3](#_Toc415820954)

[1.2.3 Testing 3](#_Toc415820955)

[1.3 Areas Out of Scope 4](#_Toc415820956)

[2 Project Approach, Timeline, and Service Deliverables 5](#_Toc415820957)

[2.1 Approach 5](#_Toc415820958)

[2.2 Timeline 6](#_Toc415820959)

[2.2.1 Plan Phase 6](#_Toc415820960)

[2.2.2 Build Phase 7](#_Toc415820961)

[2.2.3 Stabilize Phase 7](#_Toc415820962)

[2.2.4 Deploy Phase 8](#_Toc415820963)

[2.3 Timeline 8](#_Toc415820964)

[2.4 Key Service Deliverables and Acceptance Process 9](#_Toc415820965)

[2.4.1 Key Project Service Deliverables 9](#_Toc415820966)

[2.4.2 Service Deliverable Acceptance Process 10](#_Toc415820967)

[2.5 Project Governance Approach 11](#_Toc415820968)

[2.5.1 Communication Plan 11](#_Toc415820969)

[2.5.2 Issue/Risk Management Procedure 11](#_Toc415820970)

[2.5.3 Change Management Process 11](#_Toc415820971)

[2.5.4 Executive Steering Committee 12](#_Toc415820972)

[2.5.5 Escalation Process 13](#_Toc415820973)

[2.6 Project Completion 13](#_Toc415820974)

[3 Project Organization and Staffing 14](#_Toc415820975)

[3.1 Project Organization Structure 14](#_Toc415820976)

[3.2 Project Roles and Responsibilities 15](#_Toc415820977)

[3.2.1 Customer Project Roles and Responsibilities 15](#_Toc415820978)

[3.2.2 Microsoft Project Roles and Responsibilities 15](#_Toc415820979)

[4 General Customer Responsibilities and Project Assumptions 19](#_Toc415820980)

[4.1 General Customer Responsibilities 19](#_Toc415820981)

[4.2 Project Assumptions 19](#_Toc415820982)

[5 Appendix 21](#_Toc415820983)

Tables

[Table 1: Software Products/Technologies 3](#_Toc415820944)

[Table 2: Required Environments 3](#_Toc415820945)

[Table 3:Test types Table 3](#_Toc415820946)

[Table 4: Defect priorities 4](#_Toc415820947)

[Table 5: Customer roles and responsibilities 15](#_Toc415820948)

[Table 6: Microsoft roles and responsibilities 15](#_Toc415820949)

Figures

[Figure 1 - Approach 5](#_Toc415227166)

[Figure 2-Project Iteration Timelines 9](#_Toc415227167)

[Figure 3- Project organization structure 14](#_Toc415227168)

1. Project Objectives and Scope
   1. Objectives

Microsoft will deliver the Enterprise Modernization Migration Jumpstart as described below. The goal of this engagement is to help customers migrate the portfolio of applications to their target environment based on a fixed scope and timeline.

Any timelines, dates, and delivery schedules that are provided here are estimates only and are subject to change.

[NOTE to engagement manager (EM): use the Pricing Calculator for this offering to determine the length of the engagement.] In addition, this should be completed with a GD Architect to align with current UPM Pricing.

* 1. Areas Within Scope

We will provide the following services:

* Migration of High-Complexity Enterprise Multi-Tier portfolio of Applications:  
  ***<<Type 1 – 6 mon>>***
  + Containing (and/or):
    - *<N1>* Simple/ *<N2>* Medium/ *<N3>* Complex Pages
    - Medium/high complexity services application tier
    - SQL Database of medium/high complexity, incorporating complex data types, stored procedures, triggers, SQL CLR components
  + Based on legacy .net framework v2.0-3.x
* Medium/high complexity security requirements (and/or):
  + Authentication – Windows integrated (potentially involving complex identity flow patterns, including Kerberos multi-hop delegation), Claim- or Forms-based. Both Claim and Forms Based authentication for the same application.
  + Authorization based on AzMan, AD nested groups or custom SQL based data store
  + Azure Active Directory Integration
* Use Redis cache for caching
* Use Session state provider in Azure SQL Database
* Host the Web Tier in Azure Web Role or Website
* Host the App Tier in Azure Worker Role or Website
* Move Configuration to Azure Configuration files
* Configure diagnostics in Azure table storage
* Migrate SQL Server database to Azure SQL database
* Perform T-SQL Refactoring
* Medium- to high-complexity Data Migration
* Connect on Premises SSRS/SSIS to Azure SQL Database
* Connect with SSRS/SSIS on IAAS
* Connect WITH SSRS/SSIS through VPN
* Redesign Storage (Custom Schema) to support Table/Blob and queue.
* Connect Oracle DB through VPN

***<<Type 2 – 12 mon>> - incremental requirements***

* Migrate custom WCF component infrastructure comprised of custom channels, encoders, bindings, etc.
* Migrate Enterprise Library 4.x-6.0 components
* Migrate asynchronous communication patterns using MSMQ. queued COM components, asynchronous COM+/Serviced Components,
* Rearchitect/Integrate with 3rd-party frameworks, such as Spring MVC, nHibernate, etc.
* Update performance monitoring subsystem: custom performance counters
* Migrate identity management framework – WIF, custom, etc.
* Assess/rearchitect current integration points with (and/or)
  + SharePoint 2007/2010/2013
  + O365 SharePoint Online
  + Business Data Catalog
  + BizTalk Server 2006/2010/2013
* Update email/FTP messaging support subsystem
* Update large data transfer management facility
* Redesign/Update scheduled tasks support subsystem
* Rearchitect data synchronization approach with end user connected via unstable links
* Update/Rearchitect ESB integration subsystem, including Windows Server Service Bus, etc.
* Update notification subsystem based on SQL Server Notification Services, SignalR, etc.
* Integrate application with On Premises apps (hybrid app)
* Integrate with SAP System

***<<Type 3 – 18 mon>> - incremental requirements***

* Assess/rearchitect current integration points with (and/or)
  + Host Integration Server connected to legacy mainframe
  + 3rd-party messaging product such as TIBCO, MQ Series, etc.
  + 3rd-party application server such as IBM WebSphere, Oracle WebLogic, etc.
* Implement Azure API management
* Rearchitect/Migrate orchestration subsystem based on BizTalk Orchestrations, Kafka, Windows Workflow, etc.
* Rearchitect/Migrate non-SQL data store, such as ISAM. NoSQL, etc.
* Update monitoring product integration support such as System Center, OpsNet, etc.
* Architect and implement multi-region disaster recovery strategy
* Time boxed performance testing

[NOTE to EM: using a bulleted list, add specific activities for this engagement, if there are any.]

* + 1. Software Products/Technologies

Current environment is based on the following software:

Table 1: Software Products/Technologies

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Operating Systems | Collaboration & Hosting | Databases | Development Languages | Provided by |
|  |  |  |  |  |

* + 1. Environments

The following environments will be utilized as part of this Statement of Work.

Table 2: Required Environments

|  |  |  |  |
| --- | --- | --- | --- |
| Environment | Location | Responsibility | Ready by |
| Development | Azure | Microsoft |  |
| Test | Azure | Microsoft |  |
| UAT | Azure | <Customer Name> |  |
| Production | Azure | <Customer Name> |  |

* + 1. Testing

The following testing will be performed as part of this Statement of Work.

Table 3:Test types Table

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Type | Responsible | Provides Test Data/Cases | Guidance & Support | Environment |
| System Testing | Microsoft | Microsoft | <Customer Name> | Test |
| User Acceptance Testing (UAT) | <Customer Name> | <Customer Name> | Microsoft | UAT |

As defects are identified during testing, the Defect Criticality will be jointly agreed upon by the Customer and Microsoft. The Microsoft team will triage the defect and fix all in scope P1 and P2 defects. Defect criticalities are shown in the following table.

Table 4: Defect priorities

| Defect Priority | Description of Priority |
| --- | --- |
| P1 | Showstopper defect. Development, testing, or production launch cannot proceed until the defect is corrected.  Must fix as soon as possible. Defect is blocking further progress in this area.  Solution cannot ship and the project team cannot achieve the next milestone. |
| P2 | Defect must be fixed prior to moving to production.  Does not affect test plan execution |
| P3 | It is important to correct the defect. However, it is possible to move forward into production using a workaround.  Does not impact functionality as designed (i.e., Message change in user experience program). |
| P4 | Feature enhancement or cosmetic defect.  Design change from original concepts. |

* 1. Areas Out of Scope

Any area that is not listed explicitly as being within scope is out of scope for this engagement. The areas that are out of scope for this engagement include, but are not limited to, the following:

* Code Optimization
* ALM Assessment
* Continuous Integration
* Set up of Hybrid Infrastructure
* Set up of On Premise Windows 2012 VM Instances
* Setting up VPN Connectivity
* Set up of on-premises SSIS/SSRS/BizTalk/SharePoint services
* Feature Enhancements
* Creating New Test Cases

[Note to EM: using a bulleted list, add specific areas that are out of scope for this engagement.]

1. Project Approach, Timeline, and Service Deliverables
   1. Approach

[Use key items from the Work Breakdown Structure (WBS). Relate to specific phases, as appropriate. These activities must map to the Scope and Approach sections.]

We will leverage the Microsoft Solutions Framework (MSF) to execute this Project. MSF represents an industry-proven solution development approach providing well-defined phases that address development of requirements, architectural design, detailed software design, software development, system testing, and managed release cycles. MSF organizes the solution approach into five distinct phases, depicted in the graphic below, during the project lifecycle.

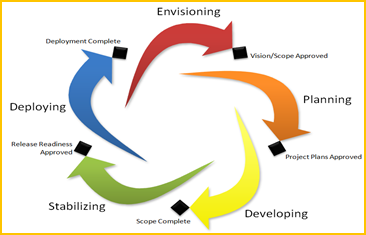


Figure - Approach

* **Envision:** Envision Phase will involve defining the scope of work necessary to bring the vision to reality. It also involves defining the project inventory (e.g. External components calls, integrations etc.)
* **Plan:** During the Plan Phase, the project team understands the application functioning, works through the design process, creates the migration approach and identifies 3rd party or Microsoft equivalents to legacy components, performs appropriate Proof of Concepts and prepares work plans, cost estimates, and schedules for the various deliverables.­
* **Build:** During the Build Phase, the team builds/migrates all aspects of the solution, including the code, scripts, and so on. This phase typically ends when the team agrees that all aspects of the solution are complete.
* **Stabilize:** In the Stabilize Phase, testing is conducted on a solution whose features are "code complete" (developers are no longer adding new code). Testing during this track emphasizes usage and operation under realistic environmental conditions. The team focuses on resolving and triaging (prioritizing) issues and bugs, and preparing the solution for release.
* **Deploy:** The deployment-complete checkpoint is the final milestone of the Deploy Phase. By this time, the solution is in the production environment and should be providing the expected business value to the customer, and the team should have effectively concluded its project processes and activities.
  1. Timeline
     1. Plan Phase

During the Plan Phase the team works through the design and prepares detailed work plans documenting what is to be delivered and when. Following the completion of this phase the team moves forward to begin construction of the solution in the Build phase.

|  |  |
| --- | --- |
| Plan Phase | |
| Goal | * The overall goal is to plan for the project through deployment |
| Microsoft Activities | * Review all requirements from the Envision Phase * Plan the order in which pieces of solution are to be designed * Creates Migration Strategy * Project Plan for remaining phases * Implement select Proof Of Concepts |
| Key Microsoft Deliverables | * Migration Approach Document consist of Technical Objectives and Constraints |
| <Customer Name> Activities | * Work with Microsoft Project Manager to refine the project plan as per the revised milestones * Review deliverables and provide feedback within five (5) business days * Work with the Microsoft Project Manager to coordinate activities * Define User Acceptance Test Cases for the solution |
| Key <Customer Name> Deliverables | * Signoff Migration Approach Document * Signoff project plan (includes Iteration Plan) |
| Exit Criteria | * Approved Migration Approach document * Approved Project Plan |
| Key Assumptions | * <Customer Name> will provide access to their IT & Business staff. * The scope will be revised at the end of planning phase to meet the project timelines. |

* + 1. Build Phase

During the Build Phase the team refines the baseline design created in the Plan Phase and builds/migrates and tests the solution. Completion of this phase marks the transition to the Stabilization Phase.

|  |  |
| --- | --- |
| Build Phase | |
| Goal | * The goal of this phase is to migrate, test and integrate solution as per the migration approach and defined as part of scope |
| Microsoft Activities | * Migrate solution as per the scope * Execution of system test cases provided by <Customer Name> * Conduct Code reviews |
| <Customer Name> Responsibilities | * Develop UAT plan and UAT test cases and provide them to Microsoft (4) four weeks before the start of Stabilize Phase * Setup the UAT environment one (1) week before the start of Stabilize Phase |
| Exit Criteria | * Work Products |
| Key Assumptions | * UAT test cases |
| Key Microsoft Work Products | * Migrated or Developed Code |
| Key <Customer Name> Deliverables | * UAT test cases |

* + 1. Stabilize Phase

During the Stabilize Phase testing is conducted on the ‘code complete’ solution and the team focuses on resolving issues and bugs to prepare the solution for release. After being reviewed and approved, the solution is ready for deployment.

|  |  |
| --- | --- |
| Stabilize Phase | |
| Goal | * To perform system testing by Microsoft testing team * Fix defects that arise during the SIT phase and selected defects during UAT |
| Microsoft Activities | * Test plan execution * Generate test report * Execute integration test cases. * Defect Tracking and management –Resolving defects discovered during SIT phase based on the acceptance criteria * Assist <Customer Name> team during UAT phase |
| <Customer Name> Responsibilities | * Sign off on test report * Perform UAT as per schedule and testing scenarios * Test code, log defects and report defects to the Microsoft Team and provide justification and steps performed in discovering the defect * Provide test report to Microsoft team * Participate in bug triaging meetings. |
| Exit Criteria | * Passing of all <Customer Name> test cases (one shared during the envision phase and with pass status in the baseline environment and the UAT Test cases) on the migrated code. |
| Key Assumptions | * Integration Test cases to be provided by customer before start of stabilization phase. |
| Key Microsoft Deliverables | * Test report after SIT * Tested code * Analysis & generation of reports. |
| Key <Customer Name> Deliverables | * Sign off on UAT * UAT test report * Steps and required data for identified defects during UAT to reproduce in test environment and triage the defects with Microsoft based on the agreed upon bug definition and priority |

* + 1. Deploy Phase

During the Deploy Phase the team conducts the activities needed to deliver the solution. By the ‘Deployment Complete’ milestone, the deployed solution should be stable and performing per design specifications allowing the Customer to sign off on the project.

|  |  |
| --- | --- |
| Deploy Phase | |
| Goal | * To support the deployment of the application in the pre-production environment |
| Microsoft Activities | * Support deployment |
| <Customer Name> Responsibilities | * Deployment |
| Exit Criteria | * Solution is deployed and validated |

* 1. Timeline

It is expected that this engagement will be performed in a number of iterations, each of them following the timeline depicted below and will include the phases and milestones noted. The actual timeline for this engagement will be relative to the project start date, and all dates and durations provided are estimates only.

<<The time lines will change based on the Complexity and the Scope. Please modify the timeline based on the Scope and Complexity>>



Figure -Project Iteration Timelines

* 1. Key Service Deliverables and Acceptance Process

Instructions to EM: [PLEASE READ, FOLLOW INSTRUCTIONS, AND THEN DELETE ALL PINK TEXT; RED TEXT REPRESENTS MANDATORY DELIVERABLES, cannot be modified, and MUST be CHANGED to black.] To record this Offering for purposes of your compensation plan, you must include at least one of the “Project Phases” that are listed in the following table (for example, Envision, Plan, Develop, or Stabilize.)

To receive credit for a Project Phase, you must include all deliverables that are identified as mandatory for the Project Phase, each of which is identified in red text below.

Any deliverables that are not marked as mandatory can be deleted, if appropriate. Be sure to verify whether modifications to the deliverables that are listed below require corresponding modifications to the “Areas Within Scope” section.

Note: the presence of deliverables in a contract has different implications (for example, mandatory warranty), based on the regulations of the country/region in which your customer resides. Please be mindful of that when you choose the type of fee (Time and Material or Fixed Fee) or the wording in the WO or SOW for your engagement. Contact your local SBD representatives if you are in doubt.

* + 1. Key Project Service Deliverables

The following is a list of the key project Service Deliverables that will be produced within the scope of this SOW and which must be formally reviewed and accepted under the process described in *Section 2.3.2.*

Table 5: Engagement Service Deliverables

| Project Phase | Service Deliverable Name | Service Deliverable Descriptions | Acceptance Criteria |
| --- | --- | --- | --- |
| Plan | Migration Plan document | * Document describing migration strategy and approach | Email Sign Off |
| Plan | Project Plan and Schedules | * Project Plan & schedules for the Build, Stabilize & Deploy Phases | Email Sign Off |
| Build | Source Code artifacts | * Source code for the solution | Email Sign Off |
| Stabilize | Test Results & Reports | * Overall Results from the System Testing of the migrated sites in * Microsoft Excel Workbook * Tested Solution Code | Email Sign Off |

[Note to EM: add specific project deliverables, if necessary.]

* + 1. Service Deliverable Acceptance Process

At specified milestones throughout the project, Microsoft will submit completed project Service Deliverables for Customer’s review and approval. Service Deliverables will fall into the following categories:

1. Document Deliverables (e.g. Word, Excel, Visio, and Project);
2. Functioning Components or Solution Deliverables (e.g. custom source code).

Customer’s use or partial use of a Service Deliverable will constitute acceptance of that Service Deliverable. Customer may provide its acceptance and/or rejection of deliverables electronically via email. The following details the acceptance process for each of the deliverable types.

***Document Deliverables:*** Within 5 business days from the date of submittal, Customer must either

(I) Accept the Document Deliverable by signing, dating and returning the Service Deliverable Acceptance Form, or

(ii) Provide a written notice rejecting the Document Deliverable, including a single and complete list describing every reason for rejection.

Document Deliverables shall be deemed accepted unless Customer provides a timely, written rejection notice as described above.

Microsoft will correct problems with a Document Deliverable that are identified in the written rejection notice, as described above, and within the scope of this Statement of Work, after which the Document Deliverable will be deemed accepted.

Issues that are outside the scope of this Statement of Work and feedback provided after a Document Deliverable has been deemed accepted will be addressed as a potential change of scope pursuant to the Change Management process outlined in this SOW.

***Functioning Components or Solution Deliverable(s):*** The functioning solution is typically comprised of configured commercial software and custom source code and associated objects. Review and acceptance of the solution or custom source code, for this SOW only, is based on completion / sign off of the defined Customer Acceptance Test.

Acceptance criterion for this project is limited to passing of all <Customer Name> provided test cases in the <Customer Name> UAT environment. Only those test cases qualify for acceptance which pass in the baseline environment.

* 1. Project Governance Approach
     1. Communication Plan

The following will be used to provide formal communication during the course of the project:

* The Microsoft Project Manager, working in conjunction with the Customer Project Manager, will document a detailed Communication Plan as part of the Master Project Management Plan.
* The Microsoft Project Manager, working in conjunction with the Customer Project Manager, will compile weekly status reports for distribution to both Customer and Microsoft management
* Weekly status meetings will be held to review the project’s overall status, the acceptance of deliverables, the project schedule, and open issues noted in the status report
  + 1. Issue/Risk Management Procedure

The following general procedure will be used to manage active project issues and risks during the project:

* **Identify:** Identify and document project issues (current problems) and risks (potential events that impact the project)
* **Analyze and Prioritize:** Assess the impact and determine the highest priority risks and issues that will be managed actively
* **Plan and Schedule:** Decide how high-priority risks are to be managed and assign responsibility for risk management and issue resolution
* **Track and Report:** Monitor and report the status of risks and issues and communicate issue resolutions
* **Control:** Review the effectiveness of the risk and issue management actions

Active issues and risks will be monitored and reassessed on a weekly basis. Mutually agreed upon issue escalation and risk management processes will be defined at the outset of the project.

* + 1. Change Management Process

During the project, either party may request, in writing, additions, deletions, or modifications to the services described in this SOW (“change request”).

For all change requests, regardless of origin, Microsoft shall submit to Customer Microsoft’s standard Change Request Form, which shall describe the proposed change(s) to the project, including the impact of the change(s) on the project scope, schedule, fees, and expenses.

For all change requests which Customer originates, Microsoft shall have a minimum of three business days from receipt of the change request to research and document the proposed change, and prepare the Change Request Form.

Customer shall have three business days from your receipt of a completed Change Request Form to accept the proposed change(s) by signing and returning the Change Request Form. If Customer does not sign and return the Change Request Form within the time period prescribed above, the change request will be deemed rejected and Microsoft will not perform the proposed change(s).

No change to this project shall be made unless it is requested and accepted in accordance with the process described in this section. Microsoft shall have no obligation to perform or commence work in connection with any proposed change until a Change Request Form is approved and signed by the designated Project Managers from both parties.

* + 1. Executive Steering Committee

Overall senior management oversight and strategic direction for this project will be provided by an Executive Steering Committee, which will consist of the following key executive business sponsors and project management representatives:

* Customer Business Sponsor
* Customer Project Sponsor
* Customer Project Manager
* Customer Technical SME
* Microsoft Project Sponsor
* Microsoft Engagement Manager
* Microsoft Project Manager
* Microsoft Architect

NOTE: Members to be determined prior to project start.

The Executive Steering Committee will hold meetings and produce meeting minutes on a monthly basis. Customer and Microsoft Managers will share joint responsibility for reporting to the Steering Committee.

The Executive Steering Committee is responsible for the following:

* Making decisions on project strategic direction
* Serving as the final arbiter of Project issues (refer to the Escalation Process)
* Approving significant Change Requests
  + 1. Escalation Process

The Microsoft Project Manager will work closely with the Customer Project Manager, Sponsor, and other designees to manage Project issues, risks, and Change Requests, as described in Sections 2.4.3 and 2.4.2 above. The standard escalation process for review and approval and/or dispute resolution is as follows:

#### Escalation Path

* Project Team member (Microsoft or Customer)
* Project Manager (Microsoft and Customer)
* Microsoft Engagement Manager / Project Sponsor

#### Guiding Principles

The escalation path and the related process will be discussed and finalized at the project kickoff, but the following general guiding principles are expected to apply:

* Significant project issues/risks, as well as material Change Requests that cannot be resolved by the core project team, will be escalated to the Executive Steering Committee as the final decision maker. The expectation is that the Executive Steering Committee will take positive action to get the issue(s) resolved in a timely manner, accept or implement recommended mitigations for identified risk(s), and/or make final decisions on the disposition of proposed Change Requests.
* If a major unresolved item requires escalation prior to a scheduled Executive Steering Committee meeting, a special meeting will be scheduled, or the item will be escalated to the committee in writing.
* It is understood and agreed that if the Executive Steering Committee does not act to resolve items that are presented to it in a timely fashion, project schedule and/or cost slippage may result, which may result in additional Change Requests.
  1. Project Completion

The project will be considered complete when any of the following conditions is met:

1. All of the service deliverables identified within this SOW and any Change Requests accepted pursuant to the Change Management Process defined in this document, delivered and accepted or deemed accepted; or
2. The fee provisions of the Work Order have been met; or
3. This SOW is terminated pursuant to the provisions of the agreement.
4. Project Organization and Staffing
   1. Project Organization Structure

This section describes the overall project organization structure, reporting relationships, and key project roles.

The project will be organized as depicted in the following diagram.



Figure - Project organization structure

* 1. Project Roles and Responsibilities
     1. Customer Project Roles and Responsibilities

Table 5: Customer roles and responsibilities

| Role | Responsibilities |
| --- | --- |
| <Customer Name> Project Sponsor | * Makes key project decisions, assists in escalating unresolved issues to the Executive Steering Committee, and clears project roadblocks |
| <Customer Name> Project Manager | * To schedule and coordinate project resources within the Customer’s organization and ensure that the stated business objectives are being met. * Primary point of contact for Microsoft team. * Responsible for managing and coordinating the overall project. * Responsible for Customer resource allocation, risk management, project priorities, and communication to executive management. * Manages day-to-day activities of the project. * Coordinates the activities of the team to deliver deliverables according to the project schedule. * Provide and respond to Customer Satisfaction Surveys |
| Application SME’s | * Customer staff with subject matter expertise which will be required by the project team at various points of the project (e.g. site administrator and development lead). |

* + 1. Microsoft Project Roles and Responsibilities

Table 6: Microsoft roles and responsibilities

| Role | Responsibilities |
| --- | --- |
| Microsoft Engagement Manager (onsite) | * Responsible for deliverable quality and Customer’s overall satisfaction with Microsoft’s services * Single point of contact for billing issues, personnel matters, contract extensions, and MCS project status * Gather and assemble all project management plans, project status reports, and project performance reports * Facilitate formal project deliverable hand over * Facilitate project governance activities and leading the Project Steering Committee * Facilitate project governance activities and leading the Project Steering Committee, providing advice and guidance on: * Project direction and scope * Stakeholder communication issue resolution and escalation |
| Project Manager (Onsite) | * Responsible for managing and coordinating the overall Microsoft project * Responsible for Microsoft resource allocation, risk management, project priorities, and communication to executive management * Manages day-to-day activities of project * Coordinates the activities of the team to deliver deliverables according to the project schedule |
| Onsite Coordinator | * Provide technical oversight to the development team * Verifies whether Microsoft recommended practices are followed * Responsible for overall solution design deployment, and quality assurance * Fully responsible for getting requirements sign-off from the customer * Attend regular call with offshore team to clarify questions and queries and explain requirements as well as design * Translated customer documents (in foreign language) to English. |
| Delivery Manager  (Offshore) | * Responsible for deliverable quality and your overall satisfaction with our services * Single point of contact for billing issues, personnel matters, contract extensions, and Microsoft project status * Initiate and facilitate the project kick-off * Set operational criteria for release to production in coordination with Fidelity meeting and project closure meeting * Facilitate Project Reviews * Gather and assemble all project deliverables that have been completed to date * Gather and assemble all project management plans, project status reports, and project performance reports * Facilitate formal project deliverable hand over at project closure to include: * Risk artefacts that represent documentation of unresolved risks in areas of developing further releases of the solution, on-going operations and supportability, and related-project risks around user-adoption or organization change management * Configuration Management and Support artefacts that represent the solution components and their change history * Operations artefacts, including operational processes and manuals as well as instructions to recreate development and test environments * Facilitate project governance activities and leading Microsoft team in the Project Steering Committee, providing advice and guidance on: * Project direction and scope * Stakeholder communication issue resolution and escalation |
| Project Manager (offshore) | * Responsible for managing and coordinating the offshore Microsoft project * Coordinates the activities with the Microsoft onsite Project Manager * Responsible for coordination of Microsoft offshore resource allocation, risk management, project priorities, and communication to executive management * Manages day-to-day offshore activities of project * Coordinates the activities of the offshore team to deliver deliverables according to the project schedule |
| Technical Lead | * Assists the design team in lower level solution design * Leads decomposition of features and capabilities to work items * Validates that the solution features and capabilities have the detail required to build the solution * Assists in iteration plan definition * Coordinate development resources * Work item creation * Work item assignment * Iteration planning * Provides status reporting for the development team |
| Technical Consultants Team | * Code fixes/bug fixes provide support to the testing team, Provide deployment assistance * Translate business requirements into a technical solution, contribute to technical design, perform code reviews to ensure all deliverable meet the required quality expectation and facilitate the delivery. * Writes and documents code/Migrates code * Create and execute unit test (if applicable) * Participate in team design sessions * Attends daily stand ups * Provides information for work item tracking * Participates in peer code and design reviews |
| Test Team | * Work directly with development team * Creates unit test processes to be followed by development (if applicable) * Create and captures test cases (if applicable in scope) * Create test scripts (if applicable in scope) * Executes test and captures results * Report test results |
| Security Reviewer | * Responsible for overall security of the solution * Reviews security code * Sets up Threat Analysis Modelling tool and performs the analysis * Recommends security touch points to architecture * Reviews design from security stand point * Drives IT audits and compliance management |
| TQA Reviewer | * Responsible for Total Quality Assurance of the proposed solution * Performs code reviews and design reviews to ensure that the application constructed meets the functional/technical needs and requirements * Ensures that the application meets high quality standards |

[Note to EM: add or delete specific project roles and responsibilities, if necessary.]

1. General Customer Responsibilities and Project Assumptions

[Note to EM: customize and add or delete bullets as appropriate for your engagement.]

* 1. General Customer Responsibilities

Delivery of Microsoft’s services depends upon, among other things, the following:

* An Executive sponsor from
* Identify and assign a point person (employee), to act as Project Lead, to coordinate and prioritize engagement, address and escalate issues
* Accurate and complete information for development and testing efforts, as needed
* Timely and effective completion of the responsibilities, as identified herein
* The accuracy and completeness of the Assumptions, identified below
* Timely decisions and approvals by Customer’s management
* Customer’s completion of site readiness activities (if applicable)

In performing services under this SOW and the applicable Work Order, Microsoft will rely upon any instructions, authorizations, approvals, or other information provided by Customer’s Project Manager or personnel duly designated by Customer’s Project Manager

Please describe specific customer responsibilities.

* 1. Project Assumptions

The Services, fees, and delivery schedule for this project are based on the following assumptions:

* <Customer Name> to procure Azure Subscription.
* Pilot for a limited set of users and use cases
* Access to current infrastructure to be provided before the start of the engagement
* Application developed by using technologies supported by Azure
* Application code compiles
* All 3rd party components and licenses to be provided by customer
* Database used is SQL Server 2005 and above
* Fix maximum ten database migration issues
* The Session State can be either in Redis Session State or SQL Azure Database
* The Repository for Form Based Authentication will be SQL Azure
* Not more the two different user roles in the application
* The approach and the estimates are indicative guidance only. The estimates and approach may change based on the actual requirements and customization requirements.
* Timeline is an indicative timeline and may vary when actual effort is estimated based on the requirements.
* The Phase duration is indicative and may vary when actual effort is estimated based on the requirements.

1. Appendix